About Your Adviser

Samuel Simpson

Authorised Representative No. 1003965

Advice to Empower

Wealth Avenue Pty Ltd

Authorised Representative No. 464390

Business Contact Details

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About Me

As your financial adviser, I am passionate about providing quality advice and solutions personalised to your needs.

I commenced my career as a financial adviser in 2009 and became an authorised representative of Alliance Wealth Pty Ltd on 15 November 2021.

I hold the following qualifications:

- Bachelor of Commerce
- Diploma of Financial Services (Financial Planning)
- Advanced Diploma of Financial Services (Financial Planning)
- Certified Financial Planner Education Program

I hold the following memberships:

- Certified Financial Planner ® of the Financial Planning Association of Australia

I am authorised to provide the following financial services:

Superannuation and Retirement Planning
Personal Superannuation Corporate Superannuation Industry and Public Sector Superannuation Pensions and Annuities Self-Managed Superannuation Centrelink / Veterans' Affairs Assistance
Wealth Creation and Investments
Cash and Term Deposits Investment Bonds Managed Investments Exchange Traded Products Listed Securities (Shares and other products)
Wealth Protection
Term Life Insurance Total and Permanent Disability (TPD) Insurance Trauma Insurance Income Protection Insurance Insurance Claims Assistance
Other Financial Planning Services
Budgeting and Cashflow Management Debt Management

My Remuneration

I am remunerated by:

- Salary plus bonus and profit share

The following table summarises the types of fees or commissions that are applicable to the services that I provide. Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply. All amounts are inclusive of Goods and Services Tax (GST).

Type of Remuneration	From	To
Hourly Rate	$440	

Type of Remuneration	Initial	Per Annum
Adviser Service Fee	$880 to $8,800	$2,640 to $6,600
Insurance Commission*	0% to 66%^	0% to 31.13%

* Based on a % of funds invested or insurance premiums
^ Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020, commission of up to 130% will apply to additional cover.

Benefits, Interests and Associations

The Business, associated entities or I have arrangements with the following parties that may be capable or reasonably seen to be capable of influencing my advice. Arrangements may include payments or benefits and/or where another party may benefit financially should you utilise certain services or products.

Where applicable the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

Related Parties
• Mortgage Choice Conord
Referral Parties
• No formal referrals relationships